

A photograph of two women in a professional setting. The woman on the left, with brown hair in a ponytail, is smiling and looking towards the right. The woman on the right, with dark hair in a bun, is looking down at a laptop screen and has a slight smile. They are both wearing business jackets. The background is a bright, out-of-focus office environment.

**PLANET** **BIDS**

# WORKFLOW OPTIMIZATION TOOLKIT

for Better Public Agency Procurement Efficiency

Manual procurement processes cost public agencies time, increase risk, and slow down project delivery. This toolkit gives procurement teams the resources they need to standardize, simplify, and strengthen their workflows using best practices and ready-to-use tools.

Use this toolkit to help you reduce delays in requisitions, communications, and approvals; eliminate repetitive and manual-heavy tasks; create more transparent and audit-ready procurement processes; and improve vendor relationships.

Each tool builds on the last to guide teams from process identification to automation readiness.

## WHAT'S INSIDE

- Workflow Mapping Template
- RFx Development Framework
- Approval Process Optimizer
- Procurement Calendar Template
- Evaluation Scorecard Template
- Communication Audit Checklist
- Workflow Modernization Action Plan

# PROCUREMENT WORKFLOW MAPPING TEMPLATE

Visualize your current workflow from requisition to award to contract management, and identify decision points, handoffs, and bottlenecks. Then use this template to compare before and after process improvements.

## PROCUREMENT WORKFLOW MAPPING TEMPLATE

Use this tool to visually document your agency's current procurement workflow, from start (requisition) to finish (award or contract management, depending on your agency's process). By mapping each step, you can identify bottlenecks, clarify roles, reduce duplication, and uncover areas that are ideal for automation or process updates.

### Step-By-Step Instructions

- Print or open the blank template (file located in the Resources section of the template).
- List the stages of your procurement process (stages below).
- Map the actions, responsible roles, and timelines for each stage.
- Highlight the pain points with color-coding:
  - **Red** = frequent delays or challenges
  - **Yellow** = partially automated or inefficient
  - **Green** = efficient and standardized
- Mark automation opportunities with a star.
- Discuss findings with cross-functional teams to determine if process improvements are needed and how to implement them.

### Target Outcome

Once complete, this map will help your team visualize inefficient manual steps, spot areas for digital transformation, and establish a baseline for future process improvements.

## What's Included

- Editable flowchart of key stages (Requisition > Solicitation Creation and Release > Bid Open and Acceptance > Evaluation and Award > Contracts Management and Reporting)
- Blank template to map your current state
- Fields for identifying bottlenecks, delays, and redundancies

## How to Use It

- Complete the current-state map with your team.
- Highlight slow or manual steps.
- Identify which processes require automation, templates, or standardization.

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# RFX DEVELOPMENT FRAMEWORK

Standardize and speed up the creation of solicitations to eliminate from-scratch bid writing and provide clearer, more comprehensive scopes of work.

## RFP/RFQ DEVELOPMENT FRAMEWORK

Streamline your solicitation creation process with a modular, customizable framework for RFPs, RFQs, and other procurement notices. This tool helps eliminate copy-paste errors, ensures compliance with public sector requirements, and reduces time spent starting from scratch.

01

### Cover Page

- Project Title
- Solicitation Number
- Issuing Agency
- Date of Release
- Submission Deadline
- Contact Name and Email

02

### Introduction & Background

Briefly describe your agency, the department managing the procurement, and the need or challenge the solicitation addresses.

#### EXAMPLE

"The City of Everytown is seeking qualified vendors to supply and install upgraded digital signage for the Public Works Department as part of its modernization initiative."

03

### Scope of Work

## What's Included

- Reusable template for RFPs/RFQs
- Drop-down options for common scope of work categories
- Guidance prompts to ensure completeness and compliance

## Sections Covered

- Project overview
- Submission instructions
- Evaluation criteria
- Required certifications
- Contact information

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# APPROVAL PROCESS OPTIMIZER

Automate and clarify the approval chain to speed up the process and eliminate unnecessary errors. Configure this template as a foundation for automated digital approval workflows.

## APPROVAL PROCESS OPTIMIZER

Use this tool to simplify, standardize, and automate internal approvals for procurement actions. Designed for public agencies, this optimizer ensures the right stakeholders approve the right documents, without email threads, lost signatures, or confusion over routing paths.

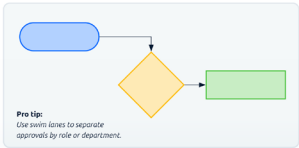
01

### Approval Workflow Diagram Template

Use this to draw or digitally map how documents should flow.

#### Stages to include:

- Requisition Submission
- Budgetary Approval
- Legal Review (if applicable)
- Department Head Sign-off
- Procurement Officer Approval
- Final Authorization (e.g., CFO or City Manager)



02

### Routing Logic Decision Table

Highlight thresholds that require public solicitation, board approval, or legal input.

Purchase Type	Dollar Threshold	Required Approvers
Office Supplies	<\$5,000	Department Head

## What's Included

- Conditional logic table (e.g., approvals based on dollar thresholds)
- Routing workflow (who approves what, when, and in what order)
- Communication guidelines for each stage

## How to Use It

- Map documentation flow
- Adjust decision table, role definitions and authority levels to fit your agency
- Complete checklist
- Build your own approval workflow to follow

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# PROCUREMENT CALENDAR TEMPLATE

Track and manage deadlines, renewals, and upcoming solicitations to better strategize and more effectively use public funds. Share this with cross-functional teams to ensure transparency and accountability.

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## PROCUREMENT CALENDAR CHECKLIST

- ☒ RFP Release Date is scheduled and communicated
- ☒ Deadline for vendor questions is clearly stated
- ☒ Vendor Q&A responses are compiled and posted on time
- ☒ Proposal submission deadline is confirmed and enforced
- ☒ Evaluation committee review window is blocked on calendars
- ☒ Review process and scoring sheets are distributed
- ☒ Vendors are notified of award decision
- ☒ Contract draft is finalized and reviewed by legal
- ☒ Final contract approvals are completed
- ☒ Kickoff meeting with awarded vendor is scheduled

## What's Included

- Excel and Google Sheets-compatible calendar
- Pre-loaded fields for:
  - Bid release dates
  - Evaluation periods
  - Contract expirations
  - Key internal review deadlines

## How to Use It

Follow this template to build your own procurement calendar, with key milestones and responsible parties, and share it with your team so they can understand expectations and scheduling.

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# EVALUATION SCORECARD TEMPLATE

Simplify and standardize bid evaluations for more accurate calculations, better collaboration between evaluators and teams, and more transparency for the public.

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## PROCUREMENT EVALUATION CHECKLIST

- ☒ Evaluation committee members have confirmed availability.
- ☒ Each evaluator has received training on scoring methodology.
- ☒ Scoring criteria and weights are reviewed and agreed upon.
- ☒ Evaluation scorecards are prepared and distributed.
- ☒ Conflict of interest declarations are collected.
- ☒ Access to bid documents is secure and complete.
- ☒ Timeline for individual evaluations is communicated.
- ☒ Evaluation debrief meeting is scheduled.
- ☒ Final scores are calculated and reviewed for consistency.
- ☒ Evaluation summary is documented for audit readiness.

## What's Included

- Weighted scoring matrix
- Auto-calculating formulas for evaluator input
- Role-based access for each evaluation participant

## Features

- Customizable for different solicitation types
- Reduces errors in manual scoring and improves audit trail visibility

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# COMMUNICATION AUDIT CHECKLIST

Identify gaps and create better vendor relationships by improving the way you release solicitations and addenda, respond to Q&As, accept bidder pre-qualifications and certifications, and manage post-award performance. Use results to guide platform adoption or upgrade decisions.

## VENDOR COMMUNICATION AUDIT CHECKLIST

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Transparent, consistent communication is key to reducing vendor confusion, minimizing bid protests, and improving competition. This checklist helps your agency evaluate the effectiveness, reliability, and audit-readiness of your communication practices with vendors. Put a check mark next to each bullet that applies to you. For lines missing a bullet, consider implementing these to improve your communication.

### Pre-Solicitation Communication

- ✓ We provide a centralized location for vendors to access upcoming and active solicitations.
- ✓ Vendor registration instructions are clear and accessible.
- ✓ Communication about intent to bid is tracked and acknowledged.
- ✓ Pre-bid meeting dates, if applicable, are posted early and confirmed with internal teams.
- ✓ Vendor FAQs and contact protocols are included in all solicitations.

### Solicitation Period

- ✓ All vendor questions are submitted via a central system or email, not informally.
- ✓ A clear deadline for questions is published and enforced.
- ✓ All vendor questions and answers are shared with all vendors simultaneously via a formal addendum.

### Submission & Evaluation

- ✓ Confirmation of receipt is sent for all submissions (automatically or manually).
- ✓ No submissions are accepted outside the designated portal or email.
- ✓ Clarification requests from evaluators are communicated formally and tracked.
- ✓ All vendor communications are archived with bid materials for transparency.

### Post-Award & Debrief

- ✓ Awarded vendors are notified promptly and in writing.
- ✓ Non-awarded vendors receive clear notifications with the option to request feedback.
- ✓ Post-bid debrief protocols are documented and consistently applied.
- ✓ All final communications are included in the procurement file for records.

## What's Covered

- Are all addenda delivered through one system?
- Do vendors receive automated deadline reminders?
- Is there a centralized history of communications?
- Are vendor questions answered through a secure, logged platform?

## Sections Included

- Pre-Solicitation
- Solicitation Period
- Submission and Evaluation
- Post-Award and Debrief
- Evaluation Summary

DOWNLOAD THE TEMPLATE 

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# WORKFLOW MODERNIZATION ACTION PLAN

Tie everything together into a prioritized roadmap, and get a modernization plan your leadership can approve and implement.

## WORKFLOW MODERNIZATION ACTION PLAN

This action plan helps procurement teams move from recognizing inefficiencies to executing real change. It outlines a structured, phased path to digitize, simplify, and optimize procurement workflows for lasting impact.

PHASE  
01

### Assess and Map Your Current Workflow

Understand what your procurement process looks like today.

- Complete the Procurement [Workflow Mapping Template](#)
- Highlight redundant steps, handoffs, or manual processes.
- Conduct interviews with key staff to capture pain points.
- Categorize each process step by:
  - Manual vs. automated
  - Consistent vs. inconsistent
  - High risk vs. low risk

OUTCOME

A visual, documented map of your current procurement lifecycle.

PHASE  
02

### Standardize and Simplify

Create consistency and reduce complexity.

- Implement the [B2B/RFPQ Development Framework](#) to reduce copy/paste errors.
- Deploy reusable templates for:
  - Manual vs. automated
  - Consistent vs. inconsistent
  - High risk vs. low risk
- Align all stakeholders around the [Approval Process Optimizer](#).

OUTCOME

Uniform processes that save time and reduce rework.

## What's Included

- Step-by-step guide to transitioning from manual to digital procurement
- Suggested order of operations (e.g., start with mapping, then approvals, then evaluations)
- Timeline template with key milestones
- Tips for change management and stakeholder communication

## How to Use It

- Assess your current workflow to understand what processes look like today.
- Find areas to standardize and simplify.
- Identify and prioritize automation opportunities.
- Educate your team on changes.
- Execute automation plan in digestible chunks.
- Adapt and adjust new processes overtime.

DOWNLOAD THE TEMPLATE



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# WHAT'S NEXT?

Procurement transformation doesn't happen all at once, but these tools can accelerate your team's shift from reactive to proactive and from completely manual to fully automated.

Want to go further? PlanetBids provides a purpose-built, end-to-end platform designed specifically for public procurement teams, with all these workflow features built in. From automated approvals to bid specification libraries, our software is built to help you streamline operations, boost vendor relationships, and improve strategic planning.

[Book a Demo to Learn More](#)